IRA Charitable Rollover Information Sheet

If you are age 70½ or older, you may be looking for a way to make a meaningful difference while reducing your income taxes. An IRA charitable rollover is a powerful way to support Big Brothers Big Sisters Association of Florida and enjoy financial benefits this year.

Benefits of an IRA Charitable Rollover

- **Avoid taxes** on transfers of up to **$108,000** from your IRA to Big Brothers Big Sisters Association of Florida.
- **Satisfy your Required Minimum Distribution (RMD)** for the year.
- **Reduce your taxable income**, even if you do not itemize deductions.
- **Make a gift** that is not subject to charitable gift deduction limits.
- **Support the mission** of mentoring Florida's youth through Big Brothers Big Sisters.

How an IRA Charitable Rollover Gift Works

1. **Contact your IRA plan administrator** to request a direct transfer from your IRA to Big Brothers Big Sisters Association of Florida.
2. Your IRA funds will be **sent directly to our organization**, helping to continue our critical work.
3. **Important**: IRA charitable rollover gifts do **not** qualify for a charitable income tax deduction.
4. **Optional**: If you would like your gift to be designated for a specific program or purpose, please contact us in advance.

Making Your Gift

If you are ready to give, you can use your IRA to fulfill your charitable goals today.
You may also use an online "Make a Gift From My IRA" tool (offered by many IRA custodians) to initiate a **Qualified Charitable Distribution (QCD)**.

We will acknowledge your generous gift as a QCD, which may satisfy your Required Minimum Distribution if applicable.

Questions?

Contact David Arnold at davidarnold@bbbsflorida.org or call (813) 621-1188 ext. 8000. We are here to help you achieve your philanthropic goals while empowering youth across Florida.